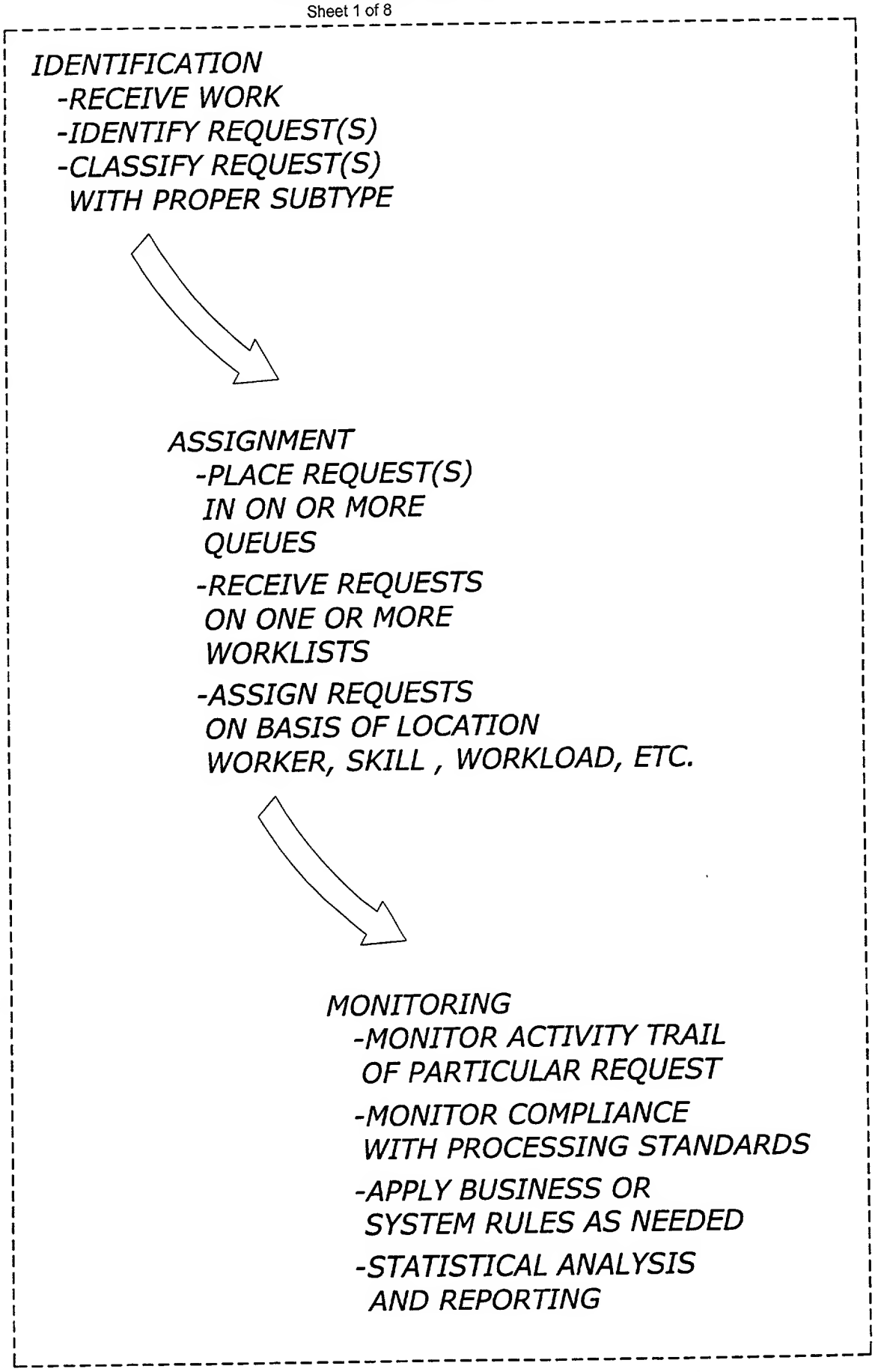
IDENTIFICATION
-RECEIVE WORK
-IDENTIFY REQUEST(S)
-CLASSIFY REQUEST(S)
WITH PROPER SUBTYPE
ASSIGNMENT
-PLACE REQUEST(S)
IN ON OR MORE
QUEUES
-RECEIVE REQUESTS
ON ONE OR MORE
WORKLISTS
-ASSIGN REQUESTS
ON BASIS OF LOCATION
WORKER, SKILL , WORKLOAD, ETC.
MONITORING
-MONITOR ACTIVITY TRAIL
OF PARTICULAR REQUEST
-MONITOR COMPLIANCE
WITH PROCESSING STANDARDS
-APPLY BUSINESS OR
SYSTEM RULES AS NEEDED
-STATISTICAL ANALYSIS
AND REPORTING

Fig. 1

20020620 9E39800T

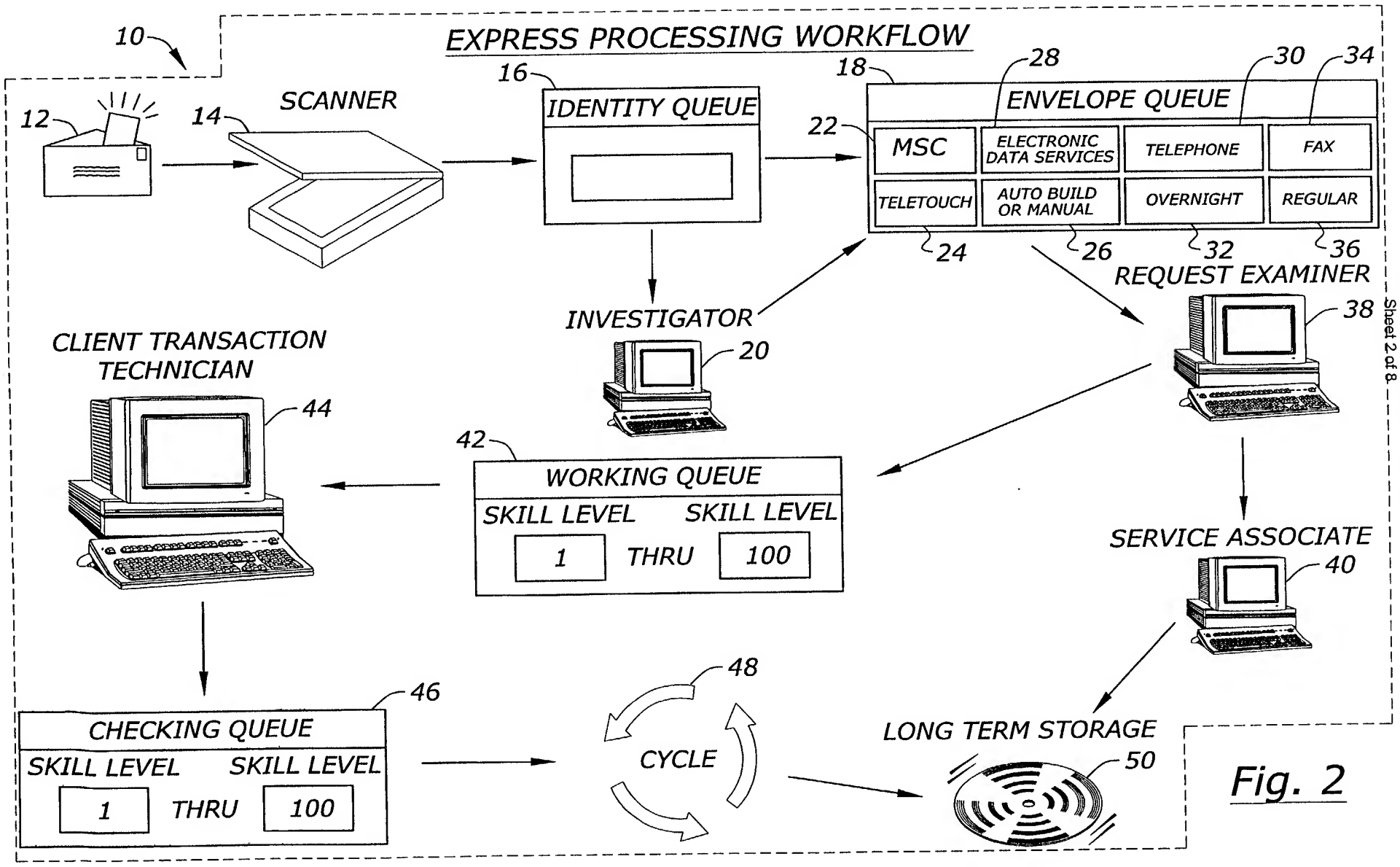


Fig. 2

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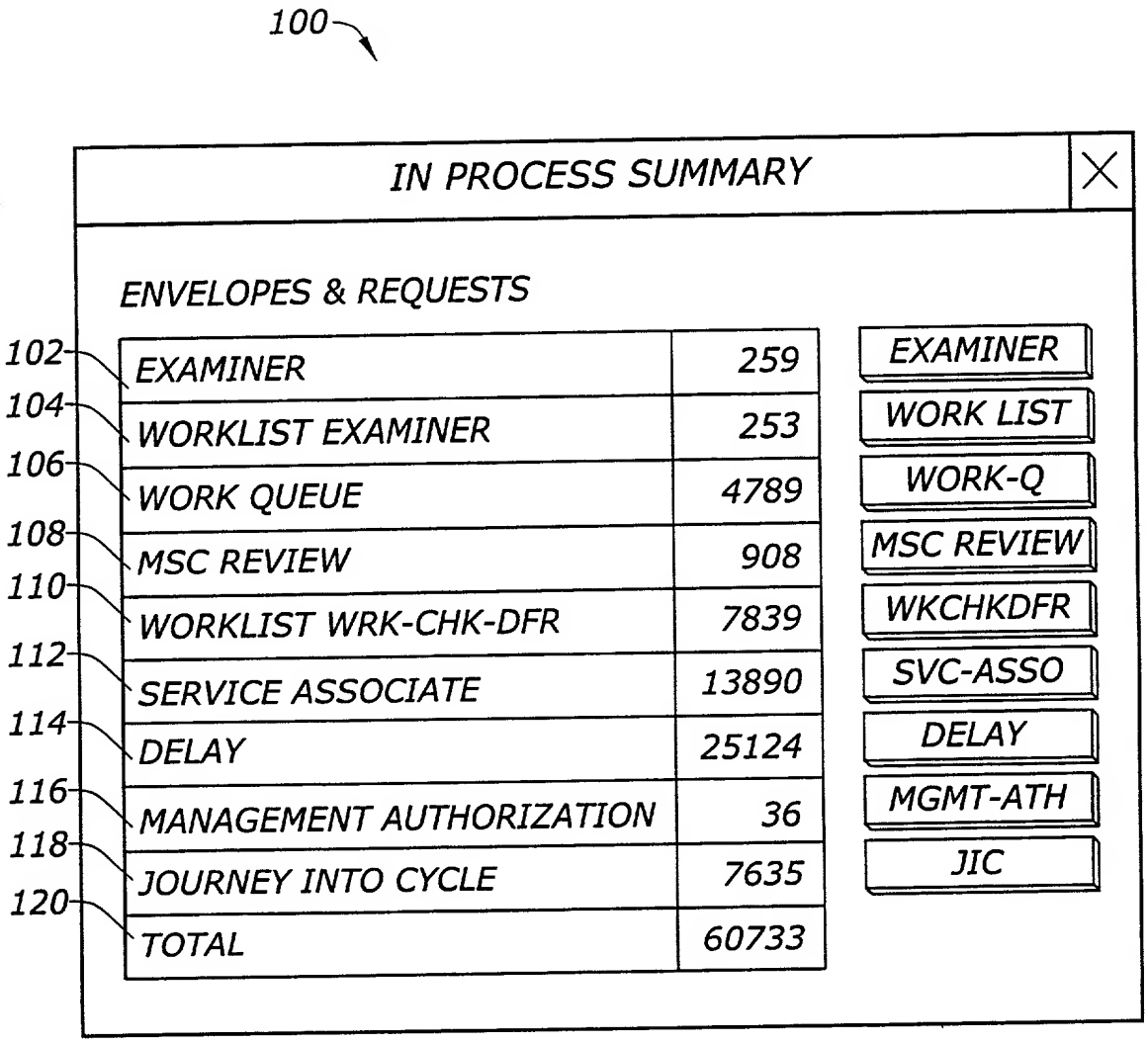
100
IN PROCESS SUMMARY
ENVELOPES & REQUESTS
102
104
106
108
110
112
114
116
118
120
EXAMINER 259
WORKLIST EXAMINER 253
WORK QUEUE 4789
MSC REVIEW 908
WORKLIST WRK-CHK-DFR 7839
SERVICE ASSOCIATE 13890
DELAY 25124
MANAGEMENT AUTHORIZATION 36
JOURNEY INTO CYCLE 7635
TOTAL 60733
EXAMINER
WORK LIST
WORK-Q
MSC REVIEW
WKCHKDFR
SVC-ASSO
DELAY
MGMT-ATH
JIC

Fig. 3

150

PRODUCT DETAIL

| 152 SKILL LEVEL | 154 OLDEST DATE | 156 TOTAL REQSTS | 158 # OF RUSHES | 160 # OF REPRES | 162 # TO BE CHK'D | 164 # TO BE WORKED |
|---|---|---|---|---|---|---|
| 3 | 08/06/2001 | 4 | | 1 | 1 | 3 |
| 5 | 08/09/2001 | 11 | | 1 | | 11 |
| 8 | 08/08/2001 | 48 | | 2 | | 48 |
| 10 | 08/11/2001 | 69 | | | 7 | 62 |
| 12 | 08/08/2001 | 13 | | 2 | | 13 |
| 15 | 08/06/2001 | 4 | | | 3 | 1 |
| 25 | 08/01/2001 | 12 | | | 1 | 11 |
| 30 | 08/03/2001 | 1 | | | | 1 |
| 35 | 08/08/2001 | 1 | | | | 1 |
| 40 | 07/12/2001 | 14 | 2 | 1 | 3 | 11 |
| 50 | 08/08/2001 | 71 | | | | 71 |
| 51 | 05/12/2001 | 8 | 1 | 1 | 3 | 5 |
| 52 | 07/10/2001 | 1 | | | | 1 |
| 53 | 02/24/2001 | 3 | | | | 3 |
| 55 | 08/07/2001 | 3 | | | 1 | 2 |
| 60 | 08/07/2001 | 2 | | | 1 | 1 |
| 65 | 08/07/2001 | 7 | | | 1 | 6 |
| 75 | 08/07/2001 | 6 | | | 1 | 5 |
| 80 | 08/03/2001 | 8 | | | 1 | 7 |
| 85 | 08/07/2001 | 1 | | | 1 | |
| 90 | 08/08/2001 | 1 | | | | 1 |
| 92 | 07/27/2001 | 1 | | | 1 | |
| 95 | 08/08/2001 | 5 | | | 1 | 4 |
| 100 | 08/08/2001 | 2 | | | | 2 |
| | TOTAL | 296 | 3 | 8 | 8 | 270 |

Fig. 4

200

## GLOBAL WORKER SUMMARY

| 202 SKILL LEVEL | 204 SKILL LEVEL DESCRIPTION | 206 QUEUE # 0 | 208 QUEUE # 300 | 210 QUEUE # 600 | 212 TOTAL |
|---|---|---|---|---|---|
| 3 | NEW ENTRANT | 5 | | 3 | 8 |
| 5 | CASH, BILLED EXPS | 9 | 1 | 3 | 13 |
| 8 | BENEFIT EVENTS | 259 | | 56 | 315 |
| 10 | EE INFO, BENES | 135 | | 9 | 144 |
| 12 | PERIS | 14 | 3 | 2 | 19 |
| 15 | LOAN, W/0, LIF INS | 10 | | 2 | 12 |
| 18 | SALARIES | | 1 | | 1 |
| 20 | ER CHGS, NO & TERMS | 67 | | 18 | 85 |
| 25 | DISTRIB, REFUNDS | 145 | | 5 | 150 |
| 30 | PRA, PLN/CN TERM (?) | 48 | | 2 | 50 |
| 35 | MOF,ALCO,FORF | 10 | | 7 | 17 |
| 38 | EXPS (COPING & SIMP) | 2 | 4 | 5 | 11 |
| 40 | AMEND/RESTART | 24 | | 2 | 26 |
| 50 | 5500 SMALL PLAN | 252 | | | 252 |
| 51 | 5500 LARGE PLAN | 12 | | | 12 |
| 52 | 5310 PLAN TERM | 1 | | | 1 |
| 53 | QUALIFICATION | 33 | | | 33 |
| 55 | CMB/SPLT,QQRO,REV | 3 | | 2 | 5 |
| 60 | WORK-UP VALUES | 8 | | 1 | 9 |
| 65 | EXP ADJ,MOF | 7 | | 3 | 10 |
| 75 | RTN OF BENEFIT, CPA | 6 | | 1 | 7 |
| 80 | ISSUE VALIDITY CHK | 11 | | 2 | 13 |
| 85 | BALANCING | 1 | | 1 | 2 |
| 90 | SPNOFF/MERGE/REWRITE | 1 | | 1 | 2 |
| 92 | ANNUITIES/F10 | 1 | | | 1 |
| 95 | REC MOVE, PRG ID, CP | 58 | 2 | 2 | 62 |
| 100 | MISC IN/OUT RESTART | 2 | 1 | | 3 |
| | TOTAL | 1124 | 12 | 126 | 1262 |
| | | | | | |

Fig. 5

4,058,958 Nov. 15, 1977

20T050 "9EE98001



250

DIVISION REPORT FROM JULY 2001 THRU JULY 2001

| 252 TEAM # | 254 AVAILABLE HOURS | 256 REQUESTS PROCESSED | 258 WEIGHTED GOAL | 260 PRODUCTIVITY FACTOR | 262 REQUESTS RETURNED | 264 QUALITY |
|---|---|---|---|---|---|---|
| T115 | 3529.4 | 7852 | 11231 | 0.675 | 225 | 97 |
| T351 | 2880.7 | 8221 | 8346 | 0.985 | 486 | 94 |
| T366 | 2778.5 | 7125 | 7773 | 0.917 | 367 | 95 |
| T440 | 2130.4 | 6819 | 9609 | 0.710 | 833 | 88 |
| TOTAL | 11319 | 29747 | 36959 | 0.805 | 1911 | 94 |

Fig. 6

300

## TEAM BY MEMBER REPORT

FROM JUL 2001 TO JUL 2001

| 302 NAME | 304 ID | 306 HOURS WORKED | 308 REQUESTS PROCESSED | 310 WEIGHTED GOAL | 312 PROD. FACTOR | 314 REQUESTS RETURNED | 316 QUALITY |
|---|---|---|---|---|---|---|---|
| USER1 | ID1 | 147.1 | 366 | 397 | 0.921 | 13 | 96 |
| USER2 | ID2 | 149.7 | 165 | 428 | 0.386 | 2 | 99 |
| USER3 | ID3 | 159 | 409 | 434 | 0.942 | 58 | 86 |
| USER4 | ID4 | 161.9 | 274 | 453 | 0.604 | 11 | 96 |
| USER5 | ID5 | 132.2 | 276 | 353 | 0.782 | 19 | 93 |
| USER6 | ID6 | 141 | 632 | 393 | 1.609 | 42 | 93 |
| USER7 | ID7 | 134 | 143 | 360 | 0.397 | 6 | 96 |
| USER8 | ID8 | 152 | 156 | 438 | 0.356 | 6 | 96 |
| USER9 | ID9 | 121.6 | 348 | 344 | 1.011 | 4 | 99 |
| USER10 | ID10 | 158 | 1180 | 440 | 2.682 | 51 | 96 |
| USER11 | ID11 | 152 | 617 | 443 | 1.394 | 29 | 95 |
| USER12 | ID12 | 108 | 438 | 322 | 1.362 | 8 | 98 |
| USER13 | ID13 | 141.7 | 815 | 399 | 2.041 | 20 | 98 |
| USER14 | ID14 | 118 | 305 | 335 | 0.91 | 14 | 95 |
| USER15 | ID15 | 151 | 469 | 679 | 0.691 | 136 | 71 |
| USER16 | ID16 | 105 | 284 | 283 | 1.002 | 24 | 92 |
| USER17 | ID17 | 122.5 | 250 | 350 | 0.714 | 10 | 96 |

Fig. 7A

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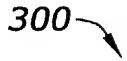
20TOED" 9E2980DT




## TEAM BY MEMBER REPORT

FROM JUL 2001 TO JUL 2001

| 302 NAME | 304 ID | 306 HOURS WORKED | 308 REQUESTS PROCESSED | 310 WEIGHTED GOAL | 312 PROD. FACTOR | 314 REQUESTS RETURNED | 316 QTY. |
|---|---|---|---|---|---|---|---|
| USER18 | ID18 | 150.5 | 193 | 416 | 0.464 | 9 | 95 |
| USER19 | ID19 | 128 | 340 | 385 | 0.882 | 6 | 98 |
| USER20 | ID20 | 125 | 469 | 356 | 1.316 | 17 | 96 |
| USER21 | ID21 | 122.5 | 92 | 336 | 0.274 | 1 | 99 |
| TOTAL | | 2880.7 | 8221 | 8346 | 0.985 | 486 | 94 |

Fig. 7B

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